



GOVERNMENT OF INDIA  
MINISTRY OF COMMERCE

# REPORT OF THE INDIAN TARIFF BOARD

ON THE  
COTTON AND HAIR BELTING INDUSTRY

वस्त्रमिव जयते

1947

PRINTED IN INDIA FOR THE MANAGER OF PUBLICATIONS DELHI  
BY THE MANAGER GOVERNMENT OF INDIA PRESS SIMLA 1948

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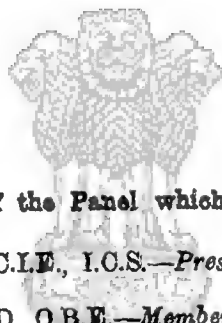
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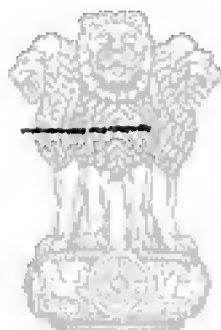
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सत्यमेव जयते

## REPORT ON COTTON AND HAIR BELTING INDUSTRY

**1.** An application for protection to the belting industry was made to the Commerce Department, Government of India, on 5th December, 1945, by the Indigenous Belting Industries Association, Calcutta. It comprises three members, viz., the Bengal Belting Works, Ltd., Calcutta, the India Belting and Cotton Mills Ltd., Serampore, and the Hindusthan Belting and Spinning Mills, Ltd., Serampore. The original application was pressed by the Association further in its letters, dated 5th April, 1946, and 4th June, 1946. The case was referred to the Board by Government in their Resolution No. 218-T(55)/45, dated 12th October, 1946, read with paragraphs 2 and 7 of their Resolution bearing the same number, dated 3rd November, 1945.

**2.** Under the Board's terms of reference which are stated in paragraph 5 of the Resolution of 3rd November, 1945, the Board has to inquire and report whether the industry satisfies the following conditions :—

(1) that it is established and conducted on sound business lines ;  
and

(2) (a) that, having regard to the natural or economic advantages enjoyed by the industry and its actual or probable costs, it is likely, within a reasonable time, to develop sufficiently to be able to carry on successfully without protection or State assistance ; or

(b) that it is an industry to which it is desirable in the national interest to grant protection or assistance and that the probable cost of such protection or assistance to the community is not excessive.

Where a claim to protection or assistance is found to be established, i.e., if condition (1) and condition 2(a) or (b) are satisfied, the Board may recommend (i) whether, at what rate and in respect of what articles, or class or description of articles, a protective duty should be imposed ; (ii) what additional or alternative measures should be taken to protect or assist the industry ; and (iii) for what period, not exceeding three years, the tariff or other measures recommended should remain in force. In making its recommendations, the Board has to give due weight to the interests of the consumer in the light of the prevailing conditions and also consider how the recommendations affect industries using the articles in respect of which protection is to be granted.

**3.** The main types of belting in use are (a) solid woven, cotton and hair, rubberised or bituminised, (b) leather and (c) rubber. Of these, the manufacture of rubber belting is undertaken by only one firm, viz., National Rubber Manufacturers, Ltd., Calcutta, and its production is practically confined to motor car fan belt, the case of which has been dealt with in the Board's report on the Rubber Manufacturing Industry. As for leather belting, the

manufacturers of this article did not evince any interest in the inquiry. Out of the fifteen manufacturers of leather belting, to whom the Board's questionnaire was issued, only one replied, but at a very late stage of the inquiry. Moreover, although the representatives of the industry present at the hearing of the case asked for the inclusion of leather belting in the inquiry, they admitted that the selling prices of indigenous leather beltings were at present definitely lower than the prices of the corresponding imported leather beltings. Consequently, leather belting was excluded from the scope of this inquiry. The present inquiry was thus confined to solid woven, cotton and hair, rubberised or bituminised, beltings only.

4. On 18th October, 1946, the Board issued a press communiqué, inviting associations and persons including producers, importers and consumers directly interested in this industry or depending upon it for their stores, who wished their views to be considered, to submit their representations. The Board also issued detailed questionnaires to producers, importers, consumers and associations. A list of those to whom questionnaires were issued and those who replied thereto, will be found in Appendix I. The Bengal Belting Works at Rishra, Serampore, was visited by Dr. H. L. Dey, a member of the Board, on 8th January 1947. Mr. R. N. Kapur and Mr. R. Sundaram, Board's Technical Adviser and Cost Accounts Officer, respectively, visited the Bengal Belting Works and India Belting and Cotton Mills, both at Serampore, on 27th June, 1947, for the purpose of preparing an estimate of cost production. Oral evidence of the representatives of producers, importers, consumers and associations was heard at Bombay on 15th and 16th July, 1947. The names of witnesses who were examined at the hearing will be found in Appendix II.

5. At present there are four firms manufacturing solid woven beltings of cotton and hair yarn, viz., the Birkmyre Bros., Ltd., the Bengal Belting Works Ltd., the India Belting and Cotton Mills Ltd., and the Hindusthan Belting and Spinning Mills, Ltd. All the four factories are situated in Serampore near Calcutta. The Birkmyre Factory was started as early as 1882 and the Bengal Belting Works in 1926. The other two firms came into production during the last war. The cotton, hair and canvas ply belting industry applied for tariff equality in 1925, on the ground that, while their finished product, viz., belting, was free of duty, three of their raw materials, viz., cotton yarn, camel hair yarn, and black proofing, were subject to import duties of 5 per cent., 15 per cent., and 15 per cent. *ad valorem*, respectively. It was thus a case of tariff inequality. An inquiry was held and a report submitted by a previous Tariff Board. The Government of India accepted some of the recommendations of the Board, and in 1928 imposed a revenue duty of 5 per cent. *ad valorem* on cotton, camel hair and canvas ply belting and reduced the duty on camel hair yarn from 15 per cent to 5 per cent. and thus restored tariff equality. During the last war, when imports of beltings had been almost completely cut off, the indigenous demand was met by the four firms mentioned above. This gave a fillip to the industry and its rated capacity increased from 750 tons per annum in the pre-war period to 1,770 tons as at present. Although this expansion of the industry was largely due to the initiative of the manufacturers themselves, Government

also had a good deal to do with it. When the supply position from the U.K. became particularly acute, the Secretary of State for India, in February 1943 suggested that the import and distribution of beltings should be regulated under a panel scheme. While a panel was being formed, the Director-General of Industries and Supplies was instructed by Government to take all possible steps to encourage the indigenous belting industry. The increased capacity thus set up during the war was fully utilised by the Supply Department to meet Government requirements as well as demand from industry, which would have otherwise been badly handicapped. The Bengal Belting Works, which is the largest unit in the industry, has a spinning plant besides some 60 looms for belting. Its spinning plant turns out about 18 tons of cotton yarn per month, but this is far from being sufficient for its full requirements, which have to be supplemented by yarn purchased from other spinning mills in India. The remaining three firms have to buy practically all their requirements of cotton yarn from the market. Hair yarn is imported at present. It was, however, contended by the indigenous manufacturers that Indian worsted yarn can be effectively substituted for the imported hair yarn.

6. Raw materials required for the manufacture of cotton and hair beltings are as follows :—

- (i) Cotton yarn,
- (ii) Hair yarn (for hair belting only),
- (iii) Paint, and
- (iv) Rubber.

Of these, only hair yarn is at present imported. It can, therefore, be said that the industry is favourably situated in respect of its essential raw materials.

7. The process consists of three operations, *viz.*, preparatory, weaving and finishing, and is not unlike the manufacture of cotton piece-goods. In the preparatory operation, the yarn which is supplied in hanks is cheested, multiplied, twisted and beamed for being used as warps. Similarly, weft yarns are light twisted and wound over pirns. In the case of hair belting, hair yarn, which is really a kind of worsted yarn made from all kinds of long coarse hair, is used for warps and cotton yarn for wefts. Weaving, which is the second operation, is carried out on special looms, although the process of weaving itself is practically the same as for cotton piece-goods or for hessian cloth, etc., with the difference that more of plied yarn is used in belting. The final or finishing operation is bituminising or rubberising the belting. Both cotton and hair beltings for use in workshops are bituminised, while belts supplied for train lighting dynamos are rubberised. Bituminising is nothing more than black painting, which is done by putting the belting into a black proofing tank and allowing it to soak for 24 to 48 hours. It is then slung over roof beams to dry. The dried belt is stretched, calendered and rolled. For the dynamo belting, ordinary cotton woven belting is impregnated with a solution of latex compound and vulcanised.



8. Belting is chiefly used for transferring mechanical power from the prime-mover to the main shaft and from the main shaft to various working machines. It is also used as conveyor belt, particularly in large assembly factories, engineering plants and mines. The dynamo belting is used for train lighting purposes.

9. A statement of imports, by value, of cotton and hair beltings from 1937-38 onwards is given in Appendix III A & Imports.

B. The statement shows that the main source of imports for both types of beltings has been the U.K., the other important sources of pre-war imports being Japan and the U.S.A. for cotton beltings and Germany for hair beltings. The Account of India's Sea-borne Trade, however, does not record the figures of imports of beltings by quantity or tonnage. Figures of tonnage of imported beltings for 1944-45, available with the Director-General of Munitions Production and furnished to the Board by the Department of Industries and Supplies, are as follows :—

		1944	1945
		(tons)	(tons)
1. Hair belting .. .. .	.. .. .	.. 394	390
2. Cotton belting .. .. .	.. .. .	.. 252	150
	Total	.. 846	540

According to Messrs. Lewis & Tylor Ltd., Calcutta, who also furnished figures of imports, which they stated were based on statistics available with the India Office in London, the figures are as follows :—

Year ending	Hair	Cotton
31st March	(tons)	(tons)
1938	331	..
1939	265	99
1940	234	123
1941	267	117
1942	293	103
1945	497	..
1946	312	160

In this connection, it may be mentioned that the Board had considerable difficulty in estimating the tonnage of imports of beltings into this country on account of the fact that the tonnage is not recorded in the Account of India's Sea-borne Trade. We recommend that this should be rectified and the figures of tonnage of imports of beltings as well as their values should in future be recorded in the Account of Sea-borne Trade of India.

10. The Indigenous Belting Industries Association estimated that the pre-war demand for beltings in the country was 1,260 tons per annum and that the present demand was approximately 1,890 tons per annum. But these figures include, besides cotton and hair beltings, leather belts, v-belts, rubber and canvas beltings. It was not possible to obtain separate figures of demand for cotton and hair beltings alone. As regard, the present demand, the

Director-General, Industries and Supplies, Government of India, estimated it at about 2,000 tons per annum. The representatives of the different interests present at the public inquiry agreed that this was a reasonable estimate of demand at the present time, and thought that it was likely to remain stable at this level for the next two or three years.

11. The rated capacity of the indigenous factories and their actual production in recent years were stated to be as under :—

Name of factory			Rated capacity on two shifts (tons)	Actual production (tons)
1. Bengal Belting Works	..	..	700	1944-45—475 (2 shifts) 1945-46—420 (,, ) July 1946 to May '47 (11 months)— 350 (,, )
2. Birkmyre Bros.	..	..	410	1944-45—190 (single shift) 1945-46—186 (,, ,, 1946-47—137 (,, ,, )
3. India Belting and Cotton Mills	..	..	330	1946-47—166 (2 shifts)
4. Hindusthan Belting and Spinning Mills	..	..	330	1944-45—250 (,, ,, 1945-46—105 (,, ,, )
			1,770	

We were informed at the public inquiry that a fifth belting factory with a rated capacity of 330 tons per annum had been established in the Serampore (Bengal) area and that it was expected to go into production in a month or two. It will thus be seen that the rated capacity of the indigenous factories including the one likely to go into production in the immediate future would come up to 2,100 tons. It may, however, be pointed out that none of the factories has ever been able to produce up to anywhere near the rated capacity in the past. This is said to have been due to (a) the non-availability of adequate raw materials and (b) the comparatively low efficiency of labour. Though Birkmyres have attained nearly 70 per cent. efficiency, the other factories have not so far gone above 60 per cent. Taking this factor into account and also having regard to the improbability of their being able to obtain their full requirements of yarn in the near future, we think that it would be safe to estimate the future total output of these factories to be between 1,200 and 1,500 tons per annum on the basis of 60—70 per cent. efficiency.

12. Coming to the question of quality, it is necessary to take up two categories of beltings separately, viz., industrial belting and train lighting belting. To take up industrial belting first, the Director-General of Industries and Supplies, Government of India, has stated

that the quality of the indigenous belting is, generally speaking, as good as that of the imported product. A similar view, based upon the experience of different railways, has been also expressed by the Railway Board. Certain industrial associations, such as the Indian Tea Association and the Indian Jute Mills Association, have, however, commented adversely on the quality of indigenous belting. After sifting the evidence, we have come to the conclusion that the indigenous industry is capable of producing cotton and hair belting of acceptable quality for industrial uses. It should also be noted that the failure of the indigenous industry to come up to the standard of the imported product is, to some extent, due to its inability to get the proper quality of raw materials, especially yarn, during the last few years. There is no reason why, with more experience, the indigenous industry should not be able to manufacture beltings of the same quality as the imports. Coming to train lighting beltings, which are manufactured by the Bengal Belting Works, the evidence shows that these beltings, which are solid woven cotton beltings, have been used by the East Indian Railway and North Western Railway and that some of the beltings have been found to remain in position and continue to be serviceable for considerable mileage—as much as 30,000 to 50,000 miles. In other cases, the beltings dropped somewhere on the way and the railways have no idea as to whether this was due to defects of the beltings or to some other cause. No conclusive evidence as to the durability of the beltings, is, therefore, available, but the consensus of opinion of the railways as stated by the Railway Board, is that these beltings do not stand up to the Railway Board specification E-14, that they are solid woven cotton beltings, vulcanised, whereas the I.R.S. specification E-14 requires rubber beltings made by vulcanisation of frictionised plies of cotton ducks. It was, however, contended by the representatives of the Bengal Belting Works that although their beltings did not come up to the railway specification, they were good substitutes for the imported beltings and had served the purpose of train lighting during the war. An examination of the evidence on the matter leads us to think that the train lighting beltings manufactured in India can be improved so as to make them suitable for train lighting purposes. We recommend that these beltings should be given, by the Railway Board, a fair trial under normal conditions and that, if they are found serviceable, the necessary changes should be made in the Indian Railway Standard specification, so as to make these beltings acceptable to the railways.

13. (a) For the purpose of estimating the cost of production and fair selling price, the Cost Accounts Officer attached to the Board, with the help of the Board's Technical Adviser, costed the Bengal Belting Works, which is the largest and most representative unit in the industry. This factory is situated at Rishra near Serampore, Bengal. It is a public limited company established in 1926 and is managed by managing agents. The factory has got 60 looms for belting and 9 looms for fire hose. In 1943, the firm added a spinning plant, which at present produces approximately 18 tons of cotton yarn per month, but this has to be supplemented

by other yarn purchased from the market. The hair yarn is imported at present, but Indian made worsted yarn can be substituted.

(b) As the management of the firm desired that its cost data should be discussed *in camera* and be treated as confidential, we are not including the details of cost in this report. These details are being submitted to Government in a separate enclosure to the report, but the firm had no objection to the comparison of the overall cost figure with the c.i.f. prices at the public inquiry.

(c) The firm does not maintain any systematic cost account, while its production records are quite inadequate. Further the accounts of the years 1945-46 and 1946-47 were not made available for the purpose of costing. The cost data available were those for the year 1944-45, which was the year of peak production for this firm. This was also the last year in which the firm manufactured fire hoses, which form the subject of another tariff inquiry by the Board. For these reasons, a cost sheet was prepared by the Cost Accounts Officer for the year 1944-45. Taking the cost figures for 1944-45 as the basis and after making necessary adjustments for changes in costs of raw materials and wages in 1946-47, an estimate of cost was prepared for the year 1946-47.

(d) The cost estimate for 1946-47 was further adjusted for certain expected changes in cost during the period 1947-48 to 1949 and an estimate was made of the future cost of production during the next 3 years.

(e) The cost estimates for 1946-47 and 1947-48 to 1949-50 include :—

- (i) bonus paid to wage earners at the rate of 2 months' wages ;
- (ii) contribution of the management towards the provident fund, which has been recently established ;
- (iii) loss on foodstuffs supplied to the workers at concession rates ;
- (iv) provision for annual increment to labourers at the rate of Rs. 2/- per head per month ;
- (v) Rs. 10,000 towards research and laboratory expenses ;
- (vi) Rs. 24,000 towards the remuneration of 4 Directors, who form the managing agents and who are whole-time officers of the firm ;
- (vii) Rs. 90,000 for the payment of minimum wages at the rate of Rs. 55/- per month, as recommended by the Central Pay Commission. We were told that the firm is going to give effect to this immediately.
- (viii) working capital required has been estimated at 3 months' cost of production and interest on this has been allowed at 4 per cent. per annum ; and
- (ix) the firm's block capital comes to Rs. 9,30,645 and interest on this has been allowed at 10 per cent. per annum.

(f) The Board's estimate of fair selling prices of cotton and hair beltings for the period 1947-48 to 1949-50 is as under :—

Fair selling prices.

Cotton Belting.		Hair Belting.	
8" × $\frac{1}{4}$ "	4" × $\frac{1}{4}$ "	3" × $\frac{1}{4}$ "	4" × $\frac{1}{4}$ "
Rs. 0-10-0	Rs. 0-14-10	Rs. 1-3-5	Rs. 1-12-0

14. Cotton, hair and canvas ply belting is included under item 50(3) of the First Schedule to the Indian Tariff Act XXXII of 1934 as in operation on 1st January 1947. The relevant extract from the Indian Customs Tariff, 27th issue, is given below :—

Item No.	Name of the article	Nature of duty	Standard rate	Preferential rate, if the article is the produce or manufacture of		
				The U. K.	A British colony.	Burma
50(3)	Cotton, hair and canvas ply belting for machinery	Revenue	7½% <i>ad valorem</i>	..	..	Free

15. A statement of recent c.i.f. prices and landed costs of beltings is given in Appendix IV A & B. The latest figures of c.i.f. prices and landed costs of cotton and hair belting are given below :—

		Cotton belting		Hair belting	
		3" × ½"	4" × ½"	3" × ½"	4" × ½"
		Rs. A. P.	Rs. A. P.	Rs. A. P.	Rs. A. P.
(a) C. i. f.	..	0-15-2	1-3-4	1-3-9	1-15-6
(b) Duty at 7½%	..	0-1-2	0-1-5	0-1-6	0-2-4
(c) Clearing charges	..	0-0-8	0-0-4	0-0-9	0-0-2
(d) Landed cost with duty	..	1-1-0	1-5-1	1-6-0	2-2-0
		(A)	(B)	(C)	(D)

(A) Balmer Lawrie & Co., Calcutta—for January 1946.

(B) Indo-British Trading Corporation, Calcutta—for July 1947.

(C) Balmer Lawrie & Co., Calcutta—for January 1946.

(D) Balmer Lawrie & Co., Calcutta—for October 1946.

16. Comparison of fair selling price and landed cost.

		Cotton belting		Hair belting	
		3" × ½"	4" × ½"	3" × ½"	4" × ½"
		Rs. A. P.	Rs. A. P.	Rs. A. P.	Rs. A. P.
(a) C. i. f.	..	0-15-2	1-3-4	1-3-9	1-15-6
(b) Clearing charges	..	0-0-8	0-0-4	0-0-9	0-0-2
(c) Landed cost ex-duty (a+b)	..	0-15-10	1-3-8	1-4-6	1-15-8
(d) Duty at 7½% on c. i. f.	..	0-1-2	0-1-5	0-1-6	0-2-4
(e) Landed cost with duty (c+d)	..	1-1-0	1-5-1	1-6-0	2-2-0
(f) Fair selling price	..	0-10-0	0-14-10	1-3-5	1-12-9
(g) Excess of landed cost ex-duty over fair selling price (e-f)	..	0-5-10	0-4-10	0-1-1	0-2-11
(h) Excess of landed cost with duty over fair selling price (e-f)	..	0-7-0	0-6-3	0-2-7	0-5-3
(i) (g) as per centage of (a)	..	38.46%	25%	5.49%	9.26%
(j) (h) as percentage of (a)	..	46.15%	32.33%	13.08%	16.66%

17. The figures of comparative prices given in the preceding paragraph show that the fair selling prices of the indigenous products are lower than the ex-duty landed cost of the corresponding imports and, of course, still lower than the duty-paid landed cost of imports. The margin in favour of the indigenous product is about 32 to 46 per cent. in the case of cotton belting and 13 to 17 per cent. in the case of hair belting, if we take the present duty into consideration. It would thus appear that, on the basis of cost price comparison, there is no need for protection at all. But there is one important factor which has to be taken into account in this case, as we have done in a number of other cases. There is a strong prejudice in the minds of consumers against the indigenous product mainly on the ground of quality. In our view, this prejudice is to some extent due to the fact that the manufacturers have not built up an adequate marketing and servicing organization, without which it is impossible for a product like belting to be established in the market. We recommend that the manufacturers should take early steps to set up marketing and servicing organization backed by propaganda and technical service. If the manufacturers act upon this recommendation and take proper steps to remedy this shortcoming, we see no reason why the present prejudice should not disappear within a few years. In the meantime, however, it is necessary that the indigenous manufacturers should be able to sell their product at an appreciably lower price than the corresponding imports. During the public inquiry, it was agreed that a price margin of 25 per cent. should be allowed in favour of the indigenous products on account of this prejudice. As the comparative cost price figures given in paragraph 15 show, if we allow 25 per cent. for prejudice, the existing duty gives more than sufficient cover for cotton beltings, but is quite insufficient for hair beltings. The production of cotton belting is, however, nearly two-thirds of the total output of the Indian factories. Therefore, taking both cases together, we consider that the existing duty should give adequate protection to the industry. We also think that the industry is likely to be placed on a stable footing within a period of about 3 years. We, therefore, recommend that the industry should be protected for the period ending 31st March 1950, and that the present revenue duty of 7½ per cent. *ad valorem* should be converted into a protective duty at the same rate, which should remain in force up to 31st March 1950.

18. The representatives of manufacturers present at the inquiry complained that their biggest bottleneck was in respect of their principal raw material, *viz.*, cotton yarn. The following figures of the industry's requirements of yarn were given to the Board at the public inquiry :—

Bengal Belting Works	..	..	..	..	60,000 lbs. per month
Birkmyre	..	..	..	..	10,000 " " "
India Belting and Cotton Mills	..	..	..	..	50,000 " " "
Hindustan Belting	..	..	..	..	50,000 " " "

We had no opportunity to scrutinise these figures and cannot say whether they represent correct estimates. We, however, recommend that the Textile Commissioner should assess the industry's requirements of yarn and meet them as far as possible.

19. As we have not recommended an increase in the present duty of 7½ per cent, our recommendations will not result in the imposition of any additional burden on the consumers.

20. Our conclusions and recommendations are summarised as under :—  
**Summary of conclusions and recommendations.**

- (i) The main types of beltings in use are (a) solid woven, cotton and hair, rubberised or bituminized, (b) leather and (c) rubber. The present inquiry is confined to solid woven, cotton and hair, rubberized or bituminized beltings only (paragraph 3).
- (ii) There are at present four factories in the country manufacturing cotton and hair beltings. The rated capacity of the industry was 750 tons per annum in the pre-war period and is 1,770 tons at present (paragraph 5).
- (iii) Of the four raw materials required for the industry, viz., cotton yarn, hair yarn, paint and rubber, only hair yarn is imported, the remaining three being available in the country (paragraph 6).
- (iv) The Account of India's Sea-borne Trade does not record the figures of imports of beltings by quantity or tonnage. It only gives figures of values. The main source of imports of cotton and hair beltings is the U.K. The figures of tonnage of imports of belting as well as their values should be recorded in the Account of Sea-borne Trade (paragraph 9).
- (v) The present demand for cotton and hair beltings is estimated at about 2,000 tons per annum, which is likely to remain stable for the next three years (paragraph 10).
- (vi) The probable output of the industry in the near future is estimated at between 1,200 and 1,500 tons per annum (paragraph 11).
- (vii) So far as industrial beltings are concerned, the quality of the indigenous beltings is, generally speaking, as good as that of the imported product. As regards train lighting beltings manufactured in the country, although they have not been found to be quite satisfactory by the railways, they are capable of improvement so as to make them suitable for train lighting purposes. These beltings should be given by the Railway Board a fair trial under normal conditions, and if they are found serviceable, necessary changes should be made in the Indian Railway Standard specification so as to make these beltings acceptable to the railways (paragraph 12).
- (viii) The manufacturers should take early steps to set up proper marketing and servicing organisations (paragraph 17).
- (ix) The existing revenue duty of 7½ per cent *ad valorem* should be converted into a protective duty at the same rate, which

should remain in force up to 31st March 1950 (paragraph 17).

(x) The Textile Commissioner should assess the industry's requirements of yarn and meet them as far as possible (paragraph 18).

(xi) Our recommendations will not result in the imposition of any additional burden on the consumers (paragraph 19).

21. The Board wishes to thank Dr. P. K. Kapre, of the Department of Industries and Supplies, Mr. R. Subbiah, representative of the Railway Board, Mr. M. Ahmadullah, Secretary to the Board, Mr. R. N. Kapur, Board's Technical Adviser, Mr. R. Sundaram, Cost Accounts Officer attached to the Board, and Dr. Rama Varma, Assistant Secretary to the Board, for their help in connection with the inquiry.

**Acknowledgments.**

C. C. DESAI,

*President.*

NAZIR AHMAD,

*Member.*

H. L. DEY,

*Member.*

M. AHMADULLAH,

*Secretary.*

BOMBAY,

11 August 1947.



## APPENDIX I

*List of persons, associations or firms to whom the Board's detailed questionnaires were issued and from whom replies or memoranda were received (vide paragraph 4).*

In addition to all the Directors of Industries, Provincial Chambers of Commerce & Trade Associations, relevant questionnaires were sent to the following known producers, importers and consumers.

(Those who replied are marked with an asterisk).

**PRODUCERS.**

- \*1. The Bengal Belting Works Limited, Calcutta.
- \*2. Birkmyre Brothers Limited, Calcutta.
- \*3. Calcutta Rubber Manufacturing Co., Calcutta.
4. The Cawnpore Tannery Limited, Cawnpore.
- \*5. The Chrome Leather Co. Limited, Chromevet.
6. Eastern Tanneries Limited, Jullunder.
7. Harness & Saddlery Factory, Cawnpore.
8. Hindusthan Belting & Spinning Mills Ltd., Serampore.
9. India Belting & Cotton Mills Limited, Serampore.
10. The India National Tannery, Cawnpore.
11. Mehar Bux & Company, Calcutta.
- \*12. Morris Bates & Company, Calcutta.
13. The Mysore Chrome Tannery Co. Ltd., Bangalore.
14. National Chamois Works Limited, Calcutta.
15. National Tannery Company Limited, Calcutta.
16. Nazir & Company, Calcutta.
17. Omar Brothers & Company, Calcutta.
18. S. K. Guha & Company, Calcutta.
19. Shafi Brothers & Company, Calcutta.
- \*20. Textile Leather Works Limited, Bombay.
21. Textile Supplies Syndicate (India) Ltd., Bombay.
22. The United Provinces Tannery Co. Ltd., Cawnpore.
23. The Upper India Tanneries, Jullunder City.
- \*24. The Western India Tanneries Limited, Bombay.

**IMPORTERS :**

1. A. Alimohamed & Company, Calcutta.
2. A. C. Sen Gupta & Sons, Calcutta.
3. A. M. Hassanally & Company, Madras.
4. A. P. Verdes, Bombay.
5. A. S. Abdullabhoj, Calcutta.
- \*6. Alcock Ashdown & Co. Ltd., Bombay.
7. Ali Hussein & Company, Madras.
8. Asia Engineering & Industries Co. Ltd., Calcutta.
- \*9. Palmer Lawrie & Company, Bombay.
10. Dattaboi & Company, Bombay.
- \*11. Best & Company Limited, Madras.
- \*12. Binny & Company (Madras) Limited, Madras.
13. Bombay Mill Stores Supply Co. Ltd., Bombay.

- \*14. British Solid Woven Belting Association, Calcutta
- 15. Buckwell & Company, Lahore.
- 16. C. Doctor & Co. Limited, Madras.
- 17. C. E. Cooling, Cawnpore.
- 18. Card Clothing & Belting Limited, Bombay.
- 19. Chas A. Schieren & Company, Bombay.
- 20. Consolidated Mill Supplies, Bombay.
- 21. Dhanraj Mills Limited, Bombay.
- 22. Dunlop Rubber Co. (India) Ltd., Calcutta.
- 23. Edgar Handley & Company, Bombay.
- 24. Edward Parker & Co. Limited, Dundee.
- 25. Elford Edwards Limited, Calcutta.
- \*26. Federation of the British Rubber Manufacturers' Association, Calcutta.
- \*27. Federation of Leather Belting Manufacturers of the United Kingdom, Manchester.
- 28. Gaytee & Company, Lahore.
- 29. Gillanders Arbuthnot & Company, Bombay.
- 30. Goodyear Tyre & Rubber Co. (India) Ltd., Calcutta.
- 31. Greaves Cotton & Company Limited, Bombay.
- 32. H. Hassan & Co., Madras.
- \*33. H. M. Mehta & Co., Bombay.
- 34. Hugh G. Fyie, Dundee.
- 35. India United Mills, Ltd., Bombay.
- 36. Indian Textile Journal, Bombay.
- \*37. Indo British Trading Corporation, Calcutta.
- \*38. J. Bracewell Limited, Bombay.
- \*39. J. H. Fenner & Co. (India) Ltd., Calcutta.
- 40. James Carmichael & Sons, Dundee.
- \*41. The Jupiter Mills Stores Company, Bombay.
- 42. Jute Industries Ltd., Calcutta.
- 43. Kola Company, Bombay.
- 44. Kilburn & Company, Calcutta.
- 45. L. Armstrong Smith, Gresham Assurance Bldg., Bombay
- \*46. Leather Belting Industrial Association, Bombay.
- 47. Lewis & Tylor Limited, Calcutta.
- \*48. Leyland & Birmingham Rubber Co. (India) Ltd., Calcutta.
- \*49. M. C. Sundara Rajan & Company, Madras.
- 50. Madanlall & Company, Calcutta.
- 51. McGavin & Company, Calcutta.
- \*52. McGregor & Balfour Limited, Calcutta.
- 53. National Trading Company, Bombay
- 54. Nowrosjee Wadia & Sons, Bombay.
- \*55. Nundlall Inderchand, Calcutta.
- 56. Ormerods (India) Limited, Bombay.
- \*57. Parry & Company, Limited, Madras.
- 58. Ratanji Bhagwanji & Co., Delhi.
- \*59. Roberts McLean & Company, Calcutta.
- 60. S. F. Broachwala & Company, Calcutta.

61. S. F. Hatim & Company, Calcutta.
62. Shafi Brothers, Calcutta.
63. Shaw Wallace & Company, Calcutta.
- \*64. Simpson & Munro Limited, Calcutta.
65. The Sizing Materials Company, Limited, Bombay.
66. Solomon & Company, Calcutta.
- \*67. Star Trading Company, Bombay.
68. Textile Supplies Syndicate (India) Ltd., Bombay.
69. Textile Supplies Syndicate (India) Ltd., Indore.
70. Textiles & General Supplies Ltd., Bombay.
71. Ujagar Singh Khazansingh, Cawnpore.
72. Volkart Brothers, Bombay.
73. W. H. Brady & Co., Ltd., Bombay.
74. Wazir Chand & Brothers, Lahore.
75. William Goodacre & Sons, Ltd., Calcut.

#### CONSUMERS :

- \*1. The Ahmedabad Jupiter Spg., Wvg. & Mfg. Co., Ahmedabad.
- \*2. The Ahmedabad Advance Mills, Ltd., Bombay.
3. Ambica Mills, Ahmedabad.
- \*4. Anglo India Jute Mills Co., Ltd., Calcutta.
- \*5. The Associated Cement Companies, Ltd., Bombay.
- \*6. Atherton West & Co., Ltd., Cawnpore.
7. Batliboi and Company, Bombay.
8. Bengal Belting Works, Ltd., Calcutta.
- \*9. Bharat & Company, Calcutta.
- \*10. Bharat Jute Mills, Ltd., Calcutta.
11. Bijili Cotton Mills, Ltd., Cawnpore.
12. Binny & Company, Ltd., Madras.
13. Birkmyre Bros., Ltd., Calcutta.
- \*14. Brooke Bond India, Ltd., Calcutta.
- \*15. Cawnpore Cotton Mills Co., Cawnpore.
- \*16. Central India Spg., Wvg. & Mfg. Co., Ltd., Nagpur.
- \*17. Chas A. Schieren & Co., Bombay.
18. Deccan Paper Mills, Poona.
- \*19. Dhanpat Mal Dewanchand, Lyallpur.
20. Dhaarvi Tanneries, Hide & Skin Merchants' Association, Bombay.
21. Dyer Meakin Breweries, Ltd., Cawnpore.
- \*22. Dyer Meakin Breweries, Ltd., Simla Hills.
23. E. D. Sasoon United Mills, Bombay.
24. Elgin Mills Co., Ltd., Cawnpore.
25. The Ganesh Flour Mills, Co., Ltd., Lyallpur.
- \*26. Garlick & Co., Ltd., Bombay.
- \*27. Gopal Singh Mahendra Singh, Saragodha.
28. H. M. Mint, Bombay.
29. Hindustan Belting & Spg. Mills, Ltd., Calcutta.
- \*30. The India United Mills, Ltd., Bombay.
31. India Belting & Cotton Mills, Ltd., Serampore.
- \*32. Indian Jute Mills Association, Calcutta.

- 33. Indian Machinery Co., Ltd., Calcutta.
- \*34. Indian Ordnance Gun & Shell Factory, Coasipore.
- \*35. Indian Ordnance Rifle Factory, Ishapore.
- \*36. Indian Sugar Mills' Association, Calcutta.
- \*37. Indian Tea Association, Calcutta.
- 38. Indian Textile Journal, Bombay.
- 39. Indigenous Belting Industries Association, Calcutta.
- \*40. Kamala Mills, Ltd., Bombay.
- 41. Katikar Jute Mills, Ltd., Calcutta.
- 42. Lakshmi Ratan Cotton Mills Co., Ltd., Cawnpore.
- 43. Lewis & Tylor Ltd., Calcutta.
- 44. Maharana Flour Mills, Bombay.
- 45. Muneklal Hiralal Spg. & Mfg. Co., Ahmedabad.
- \*46. The Marsden Spg. & Mfg. Co., Ltd., Bombay.
- \*47. Master of the Mint, Bombay.
- 48. Model Mills, Nagpur Ltd., Bombay
- \*49. The Modern Mills, Ltd., Bombay.
- 50. The Monogram Mills, Co., Ltd., Bombay.
- \*51. The Muir Mills Co., Ltd., Cawnpore.
- 52. Nagdevi Tool Steel Mart, Bombay.
- 53. New Egerton Mills, Dhariwal.
- \*54. O. T. Railway, Gorakhpur.
- 55. Orient Paper Mills, Brajrajnagar, B. N. Rly.
- 56. Phoenix Mills, Ltd., Bombay.
- 57. Rajahmundry Paper Mills, Madras.
- \*58. Richardson & Cruddas, Byculla Iron Works, Bombay.
- \*59. Shaw Wallace & Co., Calcutta.
- \*60. Sukh Sancharak Co., Ltd., Muttra.
- \*61. Swadeshi Mills Co., Ltd., Bombay.
- \*62. Tata Mills, Ltd., Bombay.
- 63. United Provinces Glass Works, Ltd., Behjoi, (District : Moradabad).
- \*64. Upper Indian Chamber of Commerce, Cawnpore.
- 65. Wazirchand & Bros., Lahore.

## APPENDIX II.

*List of witnesses examined during the public inquiry held at Bombay on the 15th & 16th of July 1947.*

(Vide paragraph 4).

## (A.) PRODUCERS.

Mr. S. C. De, ..	..	..	} Representing	{ The Bengal Belting Works Limited, Calcutta.
Mr. S. K. Chakraborty ..	..	..		
Mr. G. A. C. Tovey, ..	..	..	..	Birkmyre Bros : Ltd. Calcutta.
Mr. S. C. De ..	..	..	}	{ The Indigenous Belting Industries Association Calcutta.
Mr. G. A. C. Tovey ..	..	..		
Mr. P. S. Pandit, ..	..	..	..	{ Western India Tanneries Ltd. Bombay.
Mr. Charry, ..	..	..	..	Morris Bates & Co. Calcutta.
Mr. R. K. Chikkerar, ..	..	..	..	.. Textile Leather Works Ltd. Bombay.
Mr. R. D. Vidyarthi, ..	..	..	..	.. Engineering Association of India, Calcutta.

## (B.) IMPORTERS.

Mr. K. Bhattacharya, ..	..	..	..	.. Indo-British Trading Corporation, Calcutta.)
Mr. T. H. Larder, ..	..	..	..	.. Chas A. Schieron Co. New York (Agents, H.M. Mehta & Co. Bombay.
			..	.. Chamanlal Mangaldas & Co. Ahmedabad. The Mill Stores (Ahmedabad) Ltd. The Crompton Engineering Co. (Madras) Ltd. Jessop & Co. Ltd. Calcutta, & Kela & Co. Bombay.
Mr. K. K. Mehta, ..	..	..	..	.. The Jupiter Mill Stores Company, Bombay.
Mr. G. A. Kulkarni, ..	..	..	..	.. The Consolidated Mill Supplies Ltd. Bombay.
Mr. F. W. Alexander, ..	..	..	..	{ British Solid Woven Belting Association, Calcutta.
				{ Federation of Leather Belting Manufacturers of U. K. Manchester 2.
Mr. Wilson, ..	..	..	}	.. Lewis & Tylor Ltd. Calcutta.
Mr. Rutherford, ..	..	..		
Mr. Lofts, ..	..	..	..	.. Volkart Bros., Bombay.

## (B.) IMPORTERS (contd.)

Mr. Tutton,	..	..	..	Representing	{ Ormerods (India) Ltd. Bombay.
Mr. Allen,	..	..	..	"	Sizing Materials, Co. Ltd., Bombay.
Mr. A. K. Ghosh,	..	..	..	"	Greaves Cotton & Co. Ltd., Bombay.
Mr. D. K. Inamdar,	..	..	..	"	Dodge & Seymour Ltd., Bombay.
Mr. G. A. Houfe,	..	..	..	"	Card Clothing & Belting Ltd., Bombay.
Mr. Park,	..	..	..	"	Federation of British Rubber Manufacturers, U.K.

## (C.) CONSUMERS

Mr. A. M. Khatau, ..	..	..	..	"	The Associated Cement Companies, Ltd., Bombay I.
Mr. R. Subbiah, ..	..	..	..	"	Railway Board, New Delhi.
Mr. R. W. Palmer, ..	..	..	..	"	Indian Tea Association, Calcutta.
Mr. J. A. Murray, ..	..	..	..	"	Indian Jute Mills Association, Calcutta.
Mr. D. B. Katrak, ..	..	..	..	"	The Mill Owners Association, Bombay.

## (D.) OFFICIALS.

Dr. P. K. Kapre, ..	..	..	..	..	Industries & Supplies Depart- ment, New Delhi.
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## APPENDIX III (A)

*Statement Showing the Value of Imports of Belting for Machinery (of Cotton) to British India by Sea from the Principal Countries of Consignment Since 1937-38. (Vide Paragraph 9).*

VALUE OF IMPORTS FROM	1937-38	1938-39	1939-40	1940-41	1941-42	1942-43	1943-44	1944-45	1945-46	*1946-47
	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.
U.K.	791,607	533,839	650,520	696,647	654,088	549,908	446,818	1,161,127	881,638	469,982
Canada	8,605	5,767	44,564	32,331	59,162	40,429	..	Information not available	..	..
Germany	11,618	16,678	6,411	..	..	..	..	..	Do.	..
Japan	53,271	25,011	43,001	37,687	31,291	..	..	..	Do.	..
U.S.A.	14,055	54,815	22,835	18,396	34,310	1,943	3,666	..	Do.	..
Other Countries	379	7,200	294	327	4,333	..	..	141,680	43,654	13,056
Total	877,535	643,900	767,625	785,388	783,184	592,280	450,484	1,302,807	925,292	483,038

\*For five months only—1st April to 31st August 1946.

## APPENDIX III (B)

Statement Showing the Value of Imports of Belting for Machinery (of Hair) into British India by Sea from the Principal Countries of Consignment Since 1937-38. (Vide Paragraph 9).

	1937-38	1938-39	1939-40	1940-41	1941-42	1942-43	1943-44	1944-45	1945-46	*1946-47
VALUE OF IMPORTS FROM										
U.K.	Rs. 753,943	Rs. 787,483	Rs. 752,809	Rs. 840,668	Rs. 1,198,341	Rs. 1,033,111	Rs. 1,003,240	Rs. 2,315,230	Rs. 2,508,949	Rs. 1,123,894
Germany	262,468	278,170	97,886	..	..	..	..	Information not available		
Japan	..	947	3,964	..	..	..	..	Do.		
Other Countries	4,144	9,150	5,345	4,233	4,956	..	..	39,012	644	..
Total	1,020,560	1,075,765	849,893	844,877	1,803,277	1,033,111	1,003,240	2,354,242	2,507,593	1,133,894

\* For five months only—1st April to 31st August 1946.



## APPENDIX IV (A).

*C. I. F. prices and landed costs (with complete breakdown) and selling prices of imported Cotton belting.*

PRICES PER FOOT IN RUPES ANNAS AND PIES																	
2" WIDE				3" WIDE				4" WIDE									
Sl. No.	NAME OF FIRM	Price Quota- tion Dates	C.I.F.	Cus- toms Duty	Clear- ance & other Char- ges	Land- ed Cost	Sell- ing Price	C.I.F.	Cus- toms Duty	Clear- ance & other Char- ges	Land- ed Cost	Sell- ing Price	C.I.F.	Cus- toms Duty	Clear- ance & other Char- ges	Land- ed Cost	Sell- ing Price
1.	Best & Co. Ltd., MADRAS	1945-46	0 9 3	0 0 8	0 0 1	0 10 0	0 13 6	0 14 1	0 1 1	0 0 1	0 15 3	1 4 7	1 2 10	0 1 5	0 0 2	1 4 5	1 11 6
2.	Balmer Lawrie & Co., CALCUTTA	Jan. 46	..	..	..	..	..	0 15 2	0 1 2	0 0 8	1 1 0	1 7 0	..	..	..	..	..
3.	M. C. Sundara Rajan & Co., MADRAS	Nov. 46	0 14 10	0 1 0	0 0 2	1 0 0	1 8 1	1 6 3	0 1 6	0 0 3	1 8 0	1 10 6	1 13 8	0 2 0	0 4 2	0 0 2	3 4
4.	Shaw Wallace & Co., CALCUTTA	Dec. 46	0 7 6	7 1/2%	1/2%	0 8 3	0 11 1	..	..	..	..	..	..	..	..	..	..
5.	Parry & Co. Ltd., MADRAS	Jan. 47	..	..	..	..	..	1 8 0	0 1 10	0 0 3	1 10 1	1 12 8	2 0 11	0 2 6	0 4 2	3 9 2	7 4
6.	McGregor & Ballfour Ltd CALCUTTA	Apr. 47	..	..	..	..	..	1 3 7	7 1/2%	5%	1 6 0	1 10 6	..	..	..	..	..
7.	Indo British Trading Corporation, CAL- CUTTA	July 47	..	..	..	..	..	..	..	..	..	..	1 3 4	0 1 5	0 4 1	5 1	..

## APPENDIX IV(B)

*C. I. F. prices and landed costs (with complete breakdown) and selling prices of imported Hair bekiing.*

PRICES PER FOOT IN RUPEES ANNAS AND PIES																	
Sl. No.	NAME OF FIRM	Price Quotation Dates	2' WIDE				3' WIDE				4' WIDE						
			C. I. F.	Duty	Clear- ance & other Charges	Land- ed Cost	Sell- ing Price	C. I. F.	Duty	Clear- ance & other Charges	Land- ed Cost	Sell- ing Price	C. I. F.	Duty	Clear- ance & other Charges	Land- ed Cost	Sell- ing Price
1.	Best & Co. Limited, MADRAS	1945-46	1 0 0	1 2	0 6	1 1 3	1 7 3	1 3 11	0 1	6 0	1 11 5	6 1 13	0 2	6 0	0 2 2	2 8	2 14 3
2.	Balmer Lawrie & Co., CALCUTTA	Jan. 46	..	..	..	..	..	1 3 9	0 1	6 0	1 6 0	1 13 9	..	..	..	..	..
3.	Do.	Oct. 46	..	..	..	..	..	..	..	..	..	..	1 15 6	0 2	4 0	2 2 0	..
3.	Binnay & Compay, MADRAS	1946	0 14	0 0	10 3	0 1 0	15 0	1 4 0	..	..	..	..	..	..	..	..	..
4.	Lewis & Taylor Ltd., BOMBAY	Oct. 46	..	..	..	..	..	..	..	..	..	..	1 15 6	0 2	4 0	2 2 0	2 13 11
5.	Robert Mcleods & Co., Ltd., CALCUTTA	Jun. Dec. 46	..	..	..	..	..	1 4 2	7 1/2%	1 7 3	1 15 0	..	..	..	..	..	..
6.	M. C. Sundaresa Raian & Co., MADRAS	Nov. 46	1 4	5 0	1 4	0 0	1 8 4	1 14 7	0 2	0 0	4 2 1	2 4 6	2 3 9	0 2	9 0	6 2 12	3 0 8
7.	Nundlal Underchand, CALCUTTA	Dec. 46	..	..	..	..	..	..	..	..	..	..	1 11 0	7 1/2%	2 1 13	6 2 3 0	..
8.	Shaw Wallace & Co., CALCUTTA	Dec. 46	..	..	..	..	..	..	..	..	..	..	1 14 3	7 1/2%	2 1 9	2 13 6	..
9.	McGregor & Balfour Ltd., CALCUTTA	Apr. 47	..	..	..	..	..	..	..	..	..	..	1 10 8	7 1/2%	5 1 14	0 2 1 0	..



सत्यमेव जयते